



California
DEPARTMENT OF TECHNOLOGY
Office of Technology Services

Service Request Fulfillment Training System Overview

Date: 12/15/15

Module Objectives

- **Lesson 1:** Access SRM Application
- **Lesson 2:** Browse Request Categories and Sub-Categories
- **Lesson 3:** Overview of SRM Menu Bar Features
- **Lesson 4:** Search Service Requests
- **Lesson 4:** Overview of My Requests
- **Lesson 5:** Overview of Popular Links and Favorites

Lesson 1

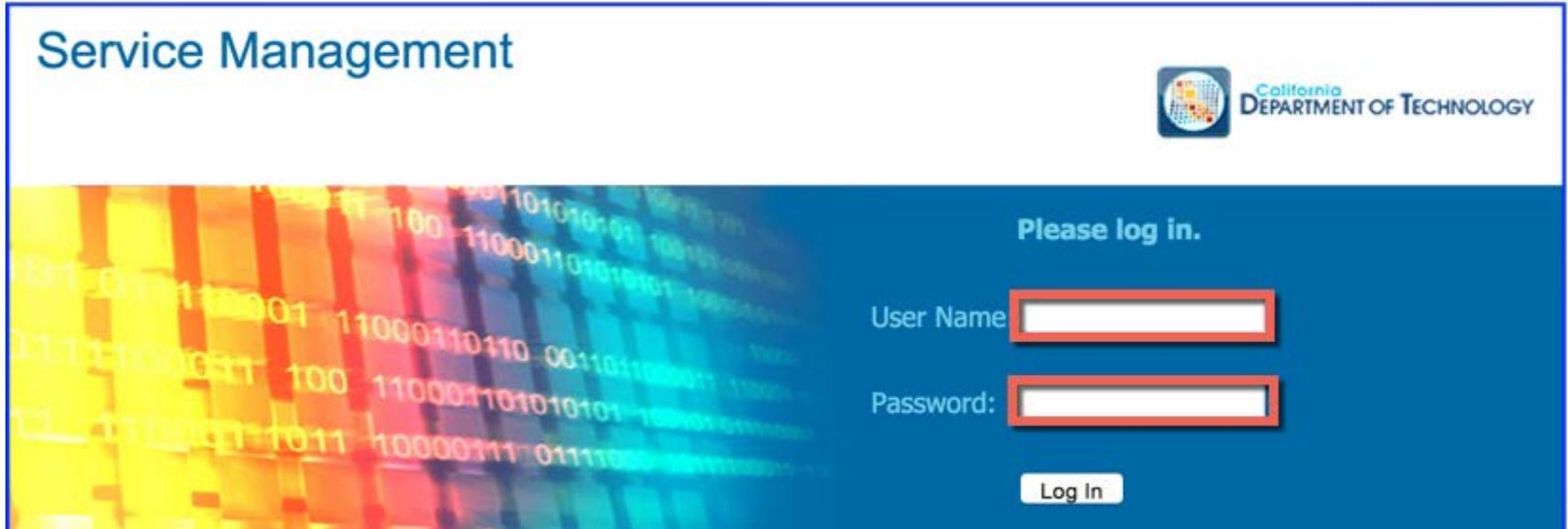
Access SRM Application



Access the ITSM Service Request Management System by going to www.otech.ca.gov and clicking on the Service Desk tab, then ITSM SRMS Login.

Lesson 1

Access SRF Application



Service Management

 California
DEPARTMENT OF TECHNOLOGY

When you open Service Request Management application from a web browser link or a URL, the SRM application Login page is displayed. Enter your case-sensitive username and password, then click Log In.

Lesson 2

Browse Request Categories and Sub-Categories



BMC Service Request Management 0

Request Service

Search ★ Favorites Popular Browse

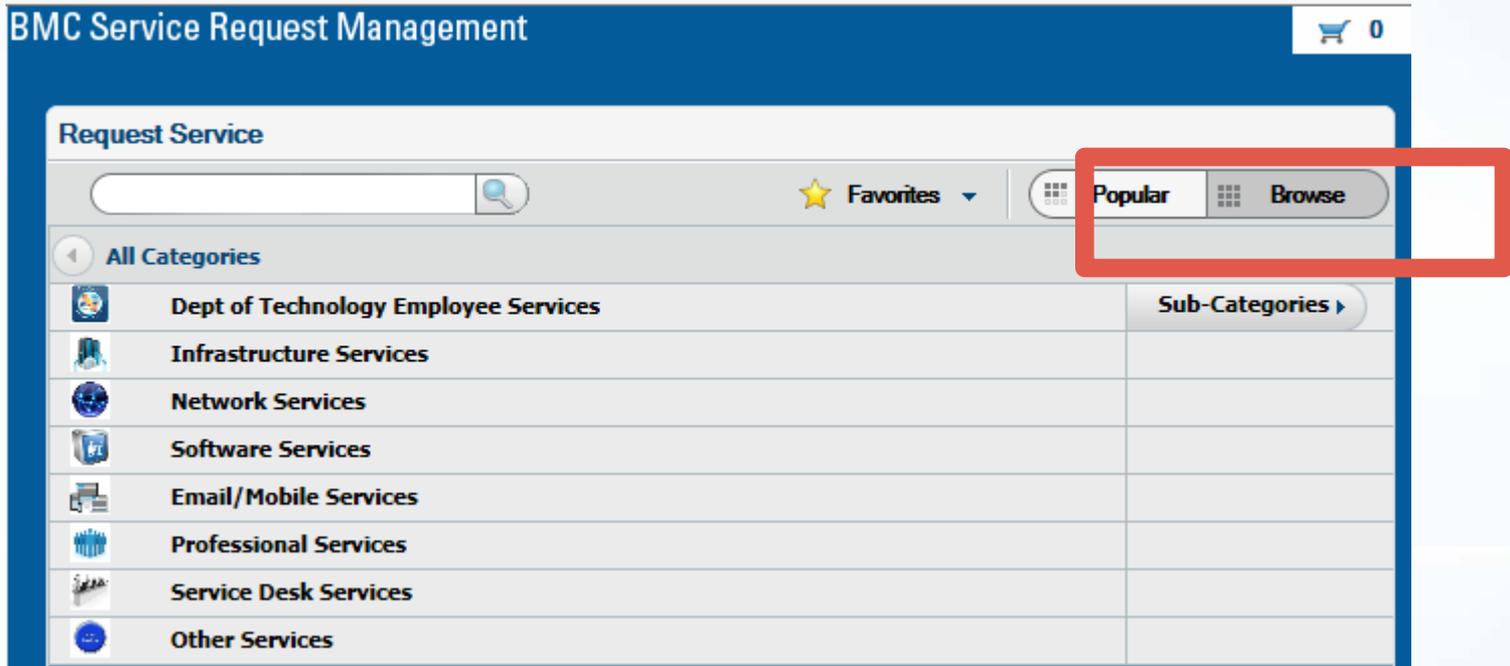
← All Categories

	Sub-Categories ▶
Dept of Technology Employee Services	
Infrastructure Services	
Network Services	
Software Services	
Email/Mobile Services	
Professional Services	
Service Desk Services	
Other Services	

Upon successful login you will have access to the *Categories, Sub-Categories, Service Requests, Preferences, Favorites, Popular Links, Settings,* and various other tools to help you create service requests and manage them.

Lesson 2

Browse Request Categories and Sub-Categories



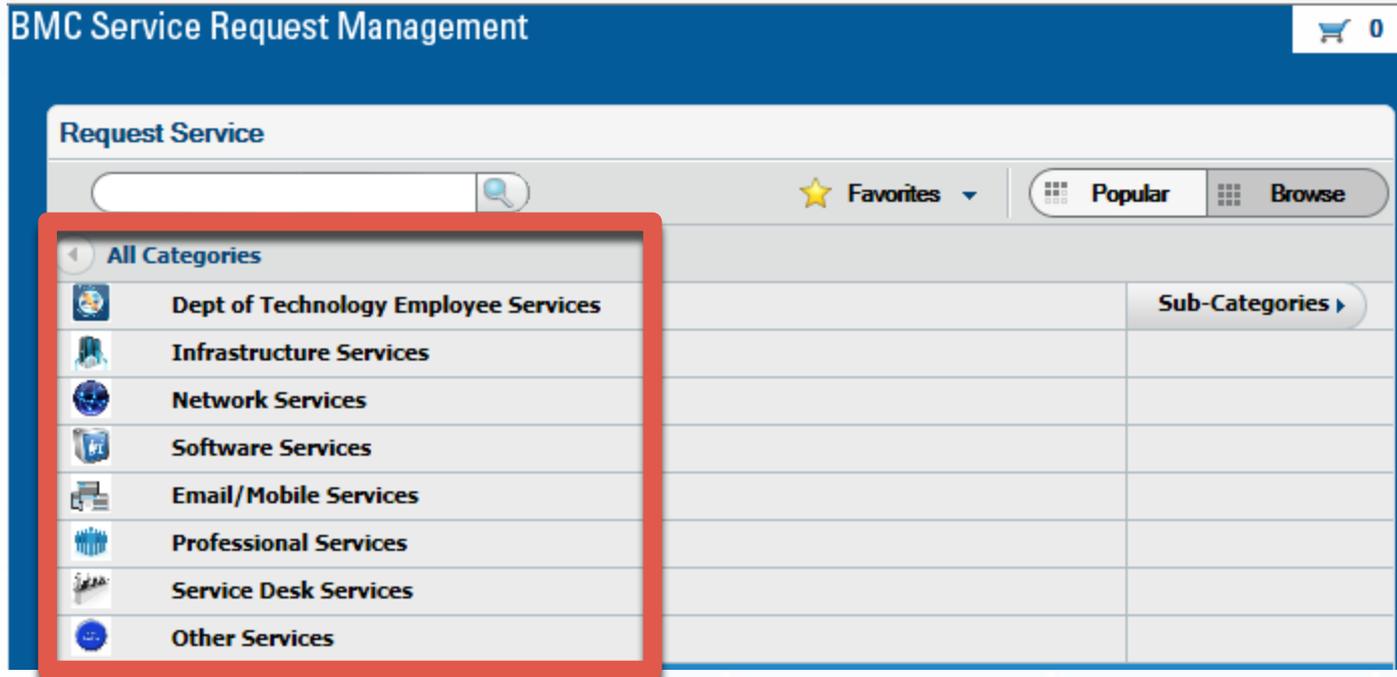
The screenshot displays the BMC Service Request Management console. At the top, the title "BMC Service Request Management" is visible on the left, and a shopping cart icon with the number "0" is on the right. Below the title bar, the "Request Service" section includes a search bar, a "Favorites" button with a star icon, and two buttons: "Popular" and "Browse". The "Browse" button is highlighted with a red rectangular box. Below this section, there is a "All Categories" header with a left-pointing arrow. A list of categories follows, each with a small icon and a "Sub-Categories" link with a right-pointing arrow:

Category	Sub-Categories
Dept of Technology Employee Services	
Infrastructure Services	
Network Services	
Software Services	
Email/Mobile Services	
Professional Services	
Service Desk Services	
Other Services	

Notice that the *Browse* button is clicked by default for you when you land on the SRM console. The *Browse* button links to request categories that are available to you.

Lesson 2

Browse Request Categories and Sub-Categories



The screenshot displays the BMC Service Request Management interface. At the top, the title "BMC Service Request Management" is visible on the left, and a shopping cart icon with the number "0" is on the right. Below the title bar, the "Request Service" section includes a search bar, a "Favorites" button with a star icon, and two buttons labeled "Popular" and "Browse". A red rectangular box highlights a list of categories under the heading "All Categories". The categories listed are:

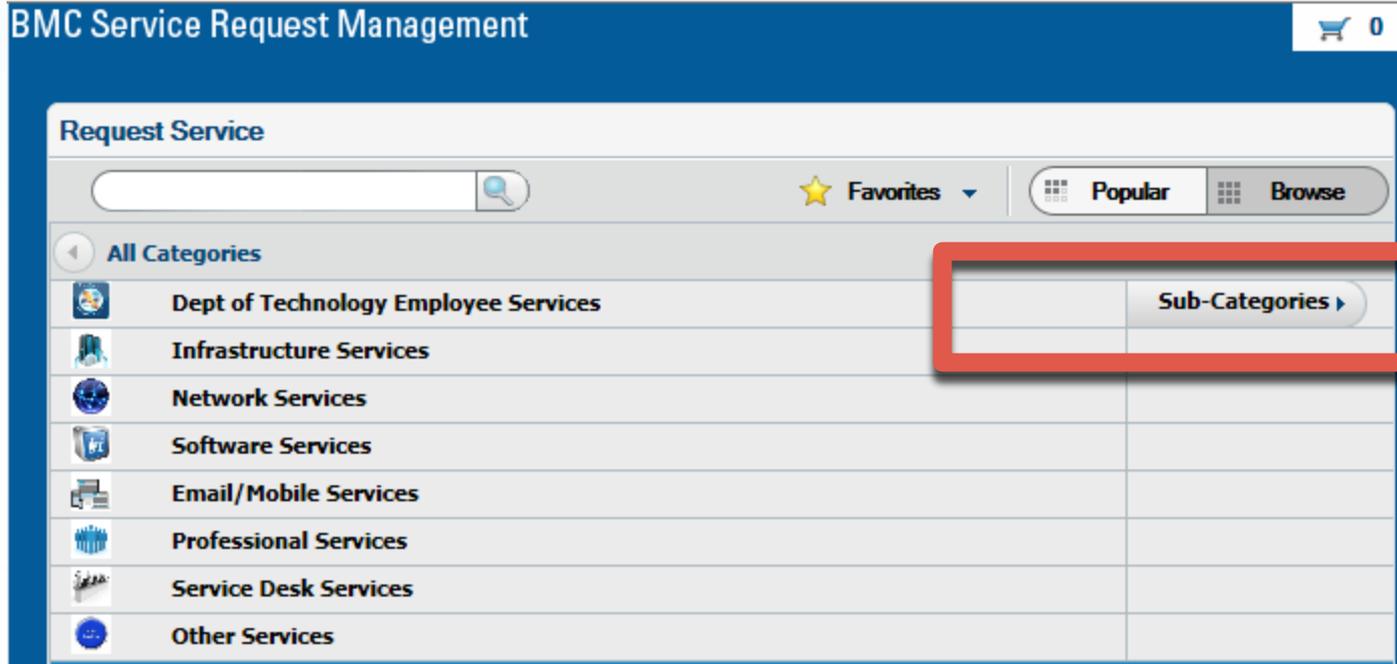
- Dept of Technology Employee Services
- Infrastructure Services
- Network Services
- Software Services
- Email/Mobile Services
- Professional Services
- Service Desk Services
- Other Services

To the right of this list is a "Sub-Categories" button with a right-pointing arrow.

When you select a category, you can view the list of requests grouped under it.

Lesson 2

Browse Request Categories and Sub-Categories



BMC Service Request Management

Request Service

Search:  Favorites  Popular  Browse 

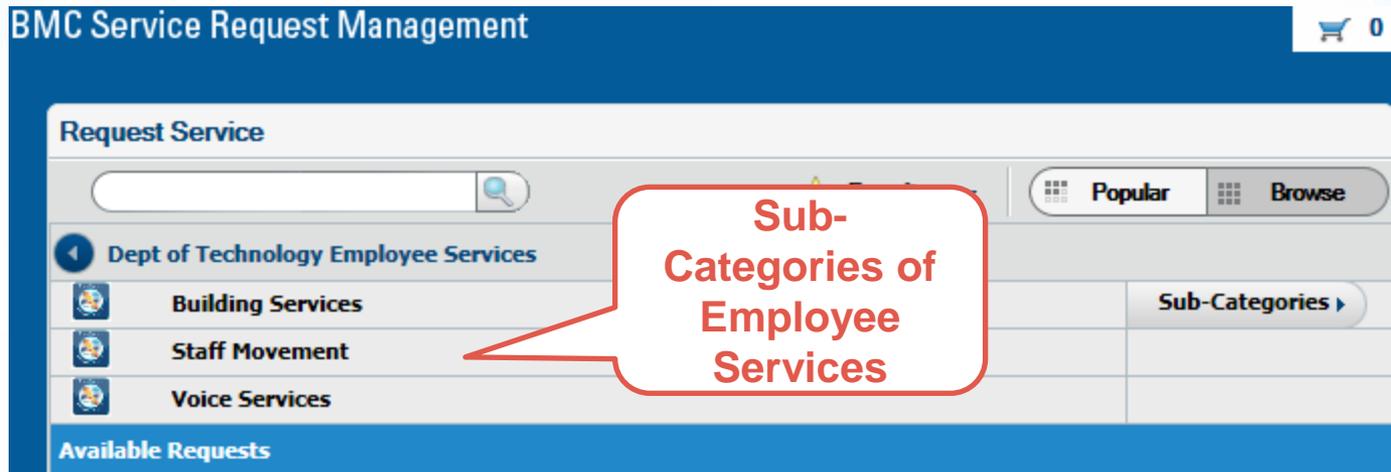
All Categories

	Dept of Technology Employee Services	
	Infrastructure Services	
	Network Services	
	Software Services	
	Email/Mobile Services	
	Professional Services	
	Service Desk Services	
	Other Services	

Depending on which department you work for, you may or may not see Sub-Categories available to you.

Lesson 2

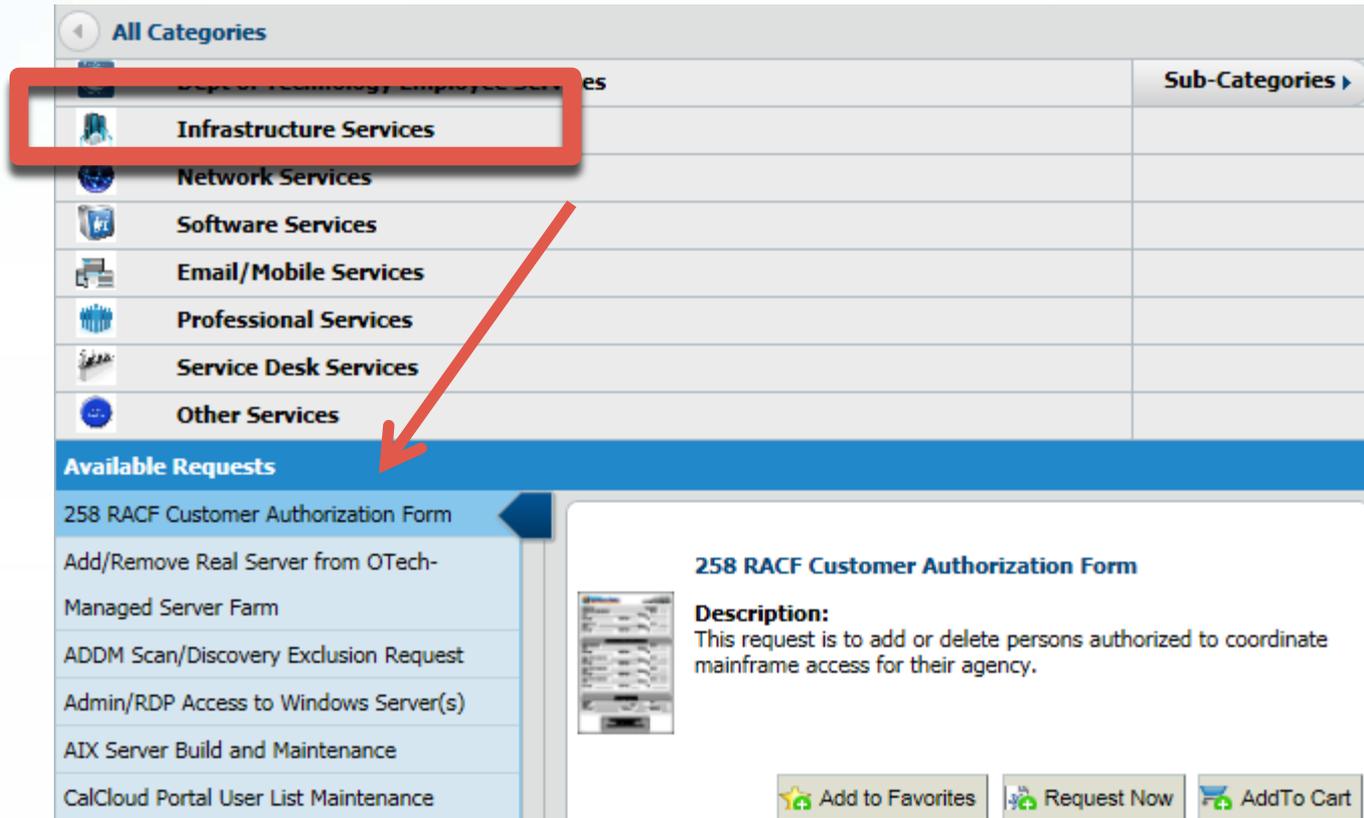
Browse Request Categories and Sub-Categories



The *Sub-Categories* view allows you to browse all the services available under a specific category. For example, this screen shows the sub-categories available under Employee Services. From the *Sub-Categories* view, you can further narrow your list by clicking the appropriate sub-category.

Lesson 2

Browse Request Categories and Sub-Categories



The screenshot displays a web interface for browsing request categories. At the top, a navigation bar shows "All Categories" with a back arrow. Below this is a list of categories, each with a small icon and a "Sub-Categories" button to its right. The "Infrastructure Services" category is highlighted with a red rectangular box. A red arrow points from this box down to the "Available Requests" section. This section features a list of requests on the left and a detailed view of the selected request on the right. The selected request is "258 RACF Customer Authorization Form".

Category	Sub-Categories
Infrastructure Services	
Network Services	
Software Services	
Email/Mobile Services	
Professional Services	
Service Desk Services	
Other Services	

Available Requests

- 258 RACF Customer Authorization Form
- Add/Remove Real Server from OTech-Managed Server Farm
- ADDM Scan/Discovery Exclusion Request
- Admin/RDP Access to Windows Server(s)
- AIX Server Build and Maintenance
- CalCloud Portal User List Maintenance

258 RACF Customer Authorization Form

Description:
This request is to add or delete persons authorized to coordinate mainframe access for their agency.

[Add to Favorites](#) [Request Now](#) [AddTo Cart](#)

Once a category is chosen, the available requests for that category are displayed below.

Lesson 3

Overview of SRF Menu Bar Features

The Menu bar consists of icons and links for the following:

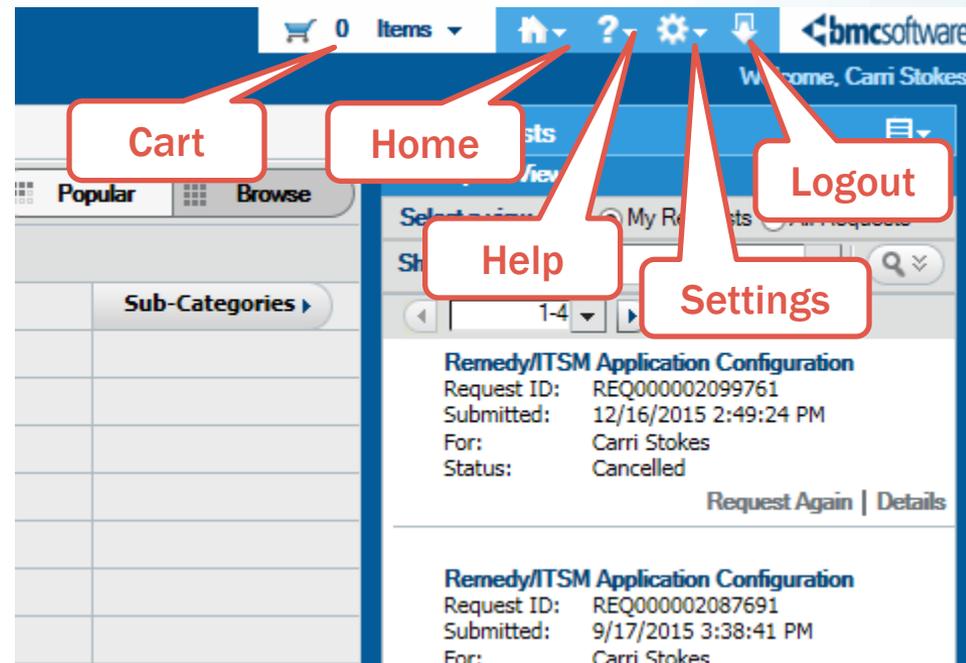
Cart: to view requests for submissions

Home: To return back to the SRM Home Page

Help: to view online help

Settings: to modify preferences or switch to another user

Logout: to log out of SRM



Lesson 4

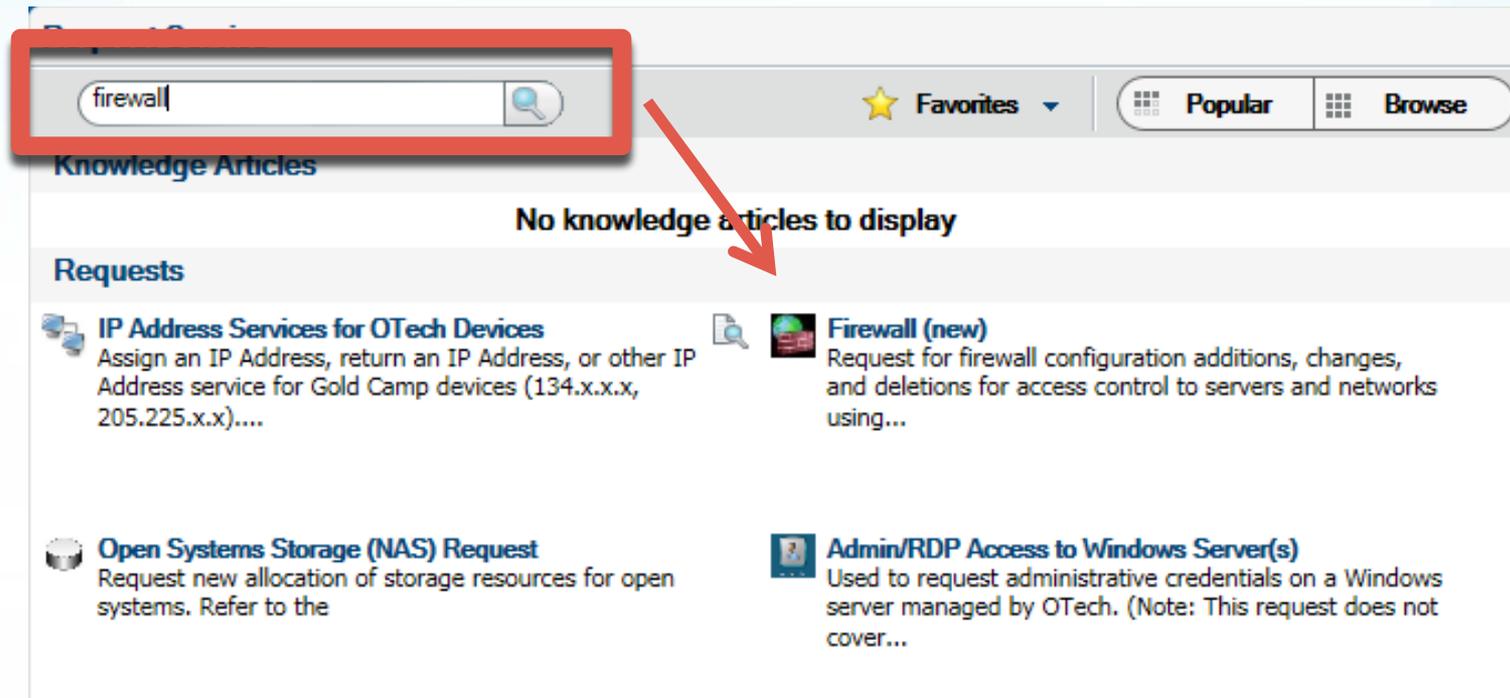
Search Service Requests

The screenshot shows the 'Request Service' interface. At the top, there is a search field containing the text 'firewall'. Below the search field is a dropdown list of suggestions, including 'firewall request', 'firewall request form', 'firewall request firewall', 'firewall change request', 'firewall (new)', 'firewall config', 'firewall modification form', 'firewall form', and 'firewall poorts'. To the right of the search field are buttons for 'Favorites', 'Popular', and 'Browse'. Below the search field is a table with columns for 'Service Categories' and 'Sub-Categories'. The table lists 'Professional Services', 'Service Desk Services', and 'Other Services'. A red box highlights the search field, and a red callout box points to the dropdown list with the text 'Search result window'.

The *Search* field enables users to find matching requests using the type-ahead functionality. When a user begins to type in the *Search* field, the application displays suggestions in a type-ahead list below the *Search* field.

Lesson 4

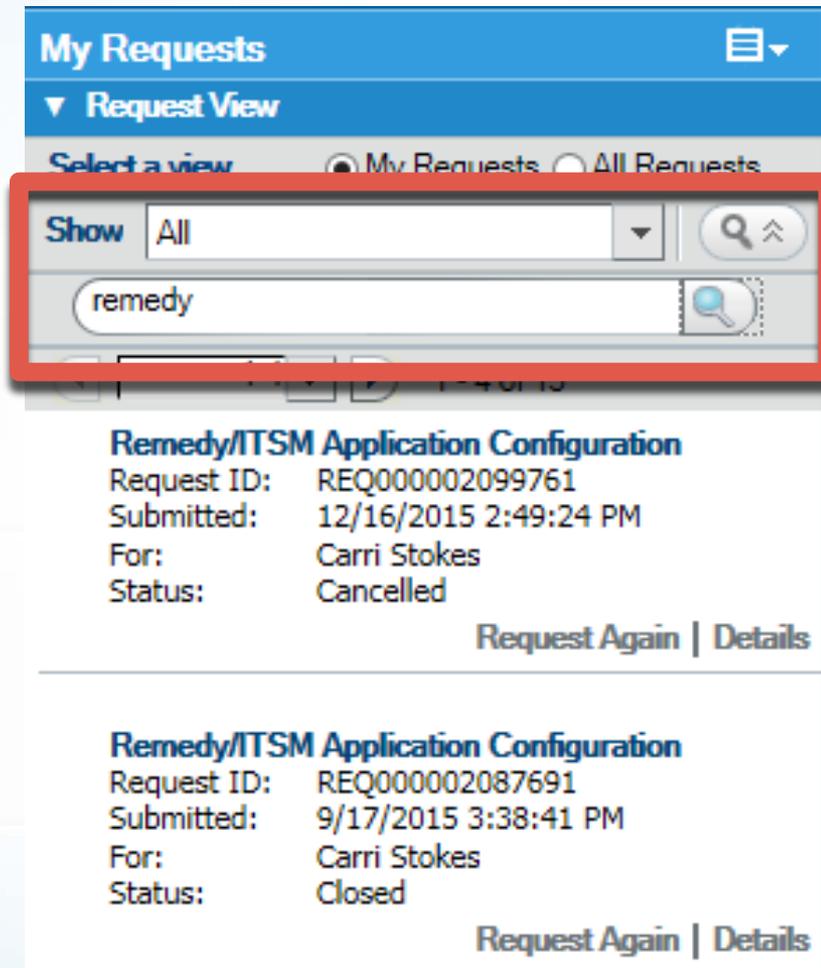
Search Service Requests



Click the magnifying glass after selecting the keyword you want to search for. SRM will present a screen similar to the one above displaying services requests that match your keyword search. Click on the link to navigate to the SR.

Lesson 4

Search Service Requests

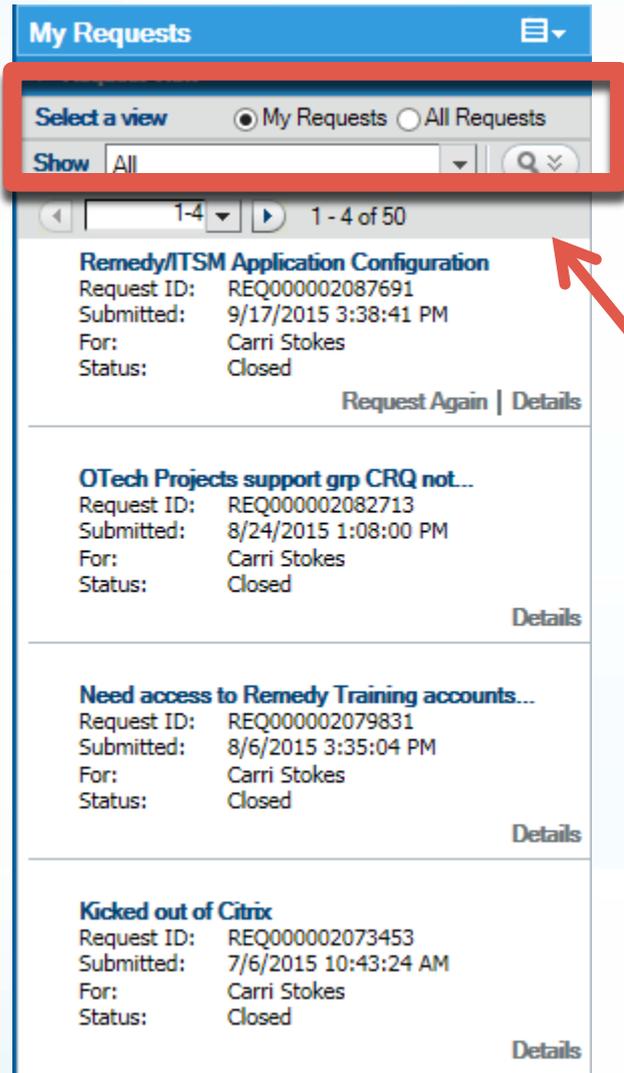


The screenshot shows a web interface for managing service requests. At the top, there is a blue header with the text "My Requests" and a dropdown menu icon. Below this is a "Request View" section with a "Select a view" dropdown set to "All" and radio buttons for "My Requests" (selected) and "All Requests". A search bar is located below the view selector, containing the text "remedy" and a search icon. A red box highlights the search bar and the "All" view dropdown. Below the search bar, two service request cards are visible, both titled "Remedy/ITSM Application Configuration". The first card shows a Request ID of REQ000002099761, submitted on 12/16/2015 at 2:49:24 PM, for Carri Stokes, with a status of "Cancelled". The second card shows a Request ID of REQ000002087691, submitted on 9/17/2015 at 3:38:41 PM, for Carri Stokes, with a status of "Closed". Each card has a "Request Again" and "Details" link.

← The Search field located under My Requests allows you to search using keywords from your existing service requests. For example, the screen shows the SRM application filtered the service requests to display on the keyword “Remedy”.

Lesson 4

View My Requests



My Requests 

Select a view My Requests All Requests

Show All 

1-4 1 - 4 of 50

Remedy/ITSM Application Configuration
Request ID: REQ000002087691
Submitted: 9/17/2015 3:38:41 PM
For: Carri Stokes
Status: Closed
[Request Again](#) | [Details](#)

OTech Projects support grp CRQ not...
Request ID: REQ000002082713
Submitted: 8/24/2015 1:08:00 PM
For: Carri Stokes
Status: Closed
[Details](#)

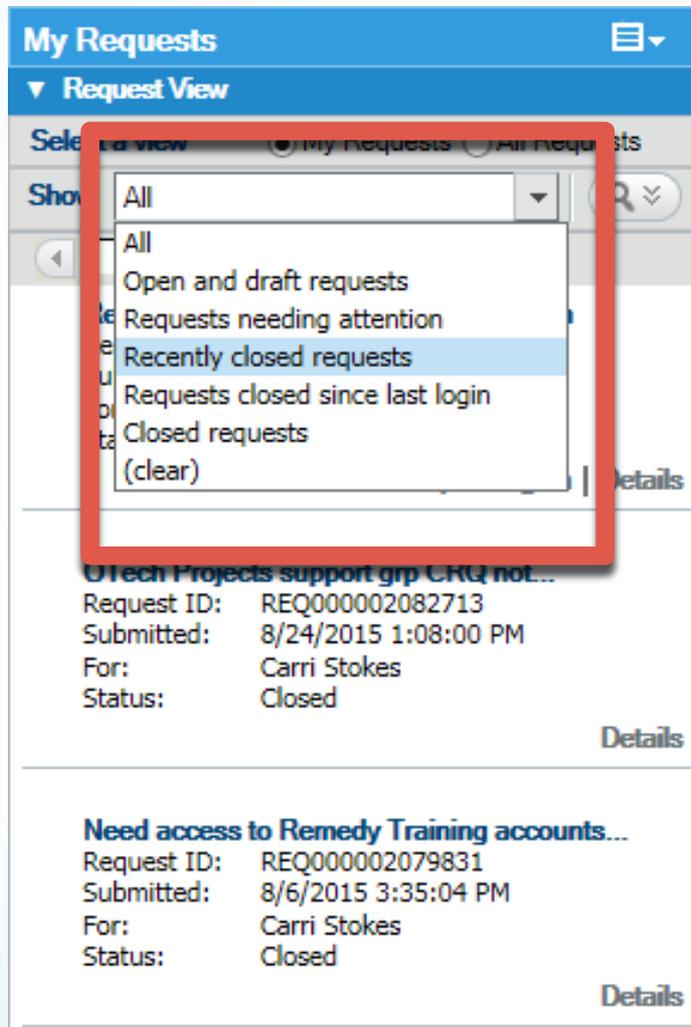
Need access to Remedy Training accounts...
Request ID: REQ000002079831
Submitted: 8/6/2015 3:35:04 PM
For: Carri Stokes
Status: Closed
[Details](#)

Kicked out of Citrix
Request ID: REQ000002073453
Submitted: 7/6/2015 10:43:24 AM
For: Carri Stokes
Status: Closed
[Details](#)

The SRM Application's *My Requests* section displays a list of requests that are submitted by you and, if any, requests that are submitted on your behalf by another user. It can also display all requests for your department by choosing the All Requests view.

Lesson 4

View My Requests



The screenshot shows the 'My Requests' interface. At the top, there is a blue header with the text 'My Requests' and a menu icon. Below the header, there is a 'Request View' section with a dropdown menu. The dropdown menu is open, showing a list of options: 'All', 'Open and draft requests', 'Requests needing attention', 'Recently closed requests', 'Requests closed since last login', 'Closed requests', and '(clear)'. The 'Recently closed requests' option is highlighted. Below the dropdown menu, there are two request cards. Each card displays the request ID, submission date and time, the user's name, and the status. The first card is for 'Utech Projects support grp CRQ not...' and the second is for 'Need access to Remedy Training accounts...'. Both cards have a 'Details' link at the bottom right.

Request ID	Submitted	For	Status
REQ000002082713	8/24/2015 1:08:00 PM	Carri Stokes	Closed
REQ000002079831	8/6/2015 3:35:04 PM	Carri Stokes	Closed

Your first four most recent requests are visible per page. To view other requests by status type, select one of the options from the *My Requests* Show list. Each option is defined on the next slide.

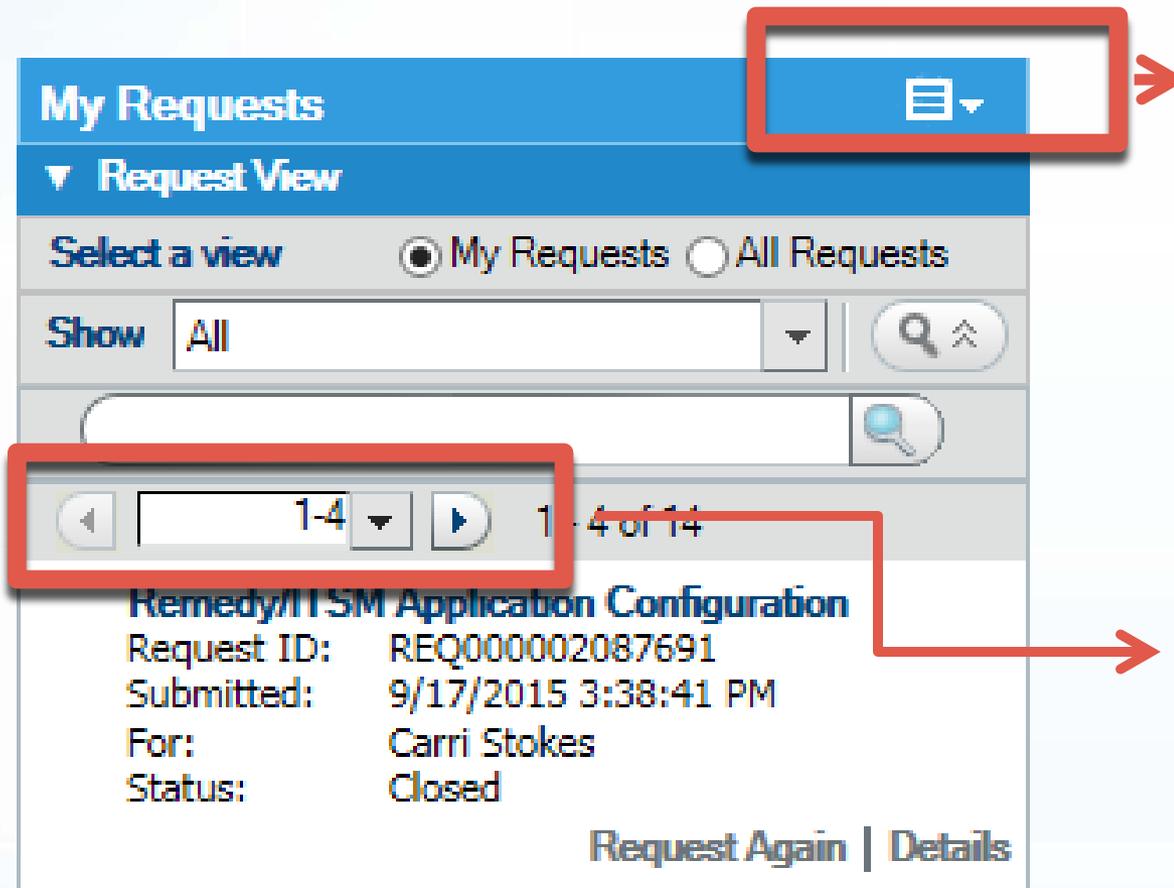
Lesson 4

View My Requests

All	Requests with all status values except 'Closed' and 'In Cart'
Open and draft requests	Requests with all status values except 'Completed', 'Closed', and 'In Cart'
Request needing attention	Requests for which a fulfillment worker has created an entry in the request's Activity Log for you to read
Recently closed requests	Requests closed within the last (7) days, because they were either fulfilled or rejected.
Requests closed since last login	Requests closed since current user last accessed the Service Request Management application
Closed requests	Requests with status of Completed, Rejected, Cancelled, or Closed

Lesson 4

View My Requests



The screenshot shows the 'My Requests' interface. At the top, there is a blue header with the text 'My Requests' and a hamburger menu icon. Below this is a 'Request View' section with radio buttons for 'My Requests' (selected) and 'All Requests'. A 'Show' dropdown is set to 'All'. The pagination bar shows '1-4' of 14 items, with left and right arrows. The first request is titled 'Remedy/ITSM Application Configuration' with details: Request ID: REQ000002087691, Submitted: 9/17/2015 3:38:41 PM, For: Carri Stokes, Status: Closed. At the bottom right of the request card are links for 'Request Again' and 'Details'.

The Print button takes you to the My Reports Console.

To view other requests, you may click the down arrow showing the number list or click the Next/Previous arrow.

Lesson 4

View My Requests

My Requests [Menu Icon]

▼ Request View

Select a view My Requests All Requests

Show All [Dropdown Arrow] [Search Icon]

1-4 [Dropdown Arrow] 1 - 4 of 51

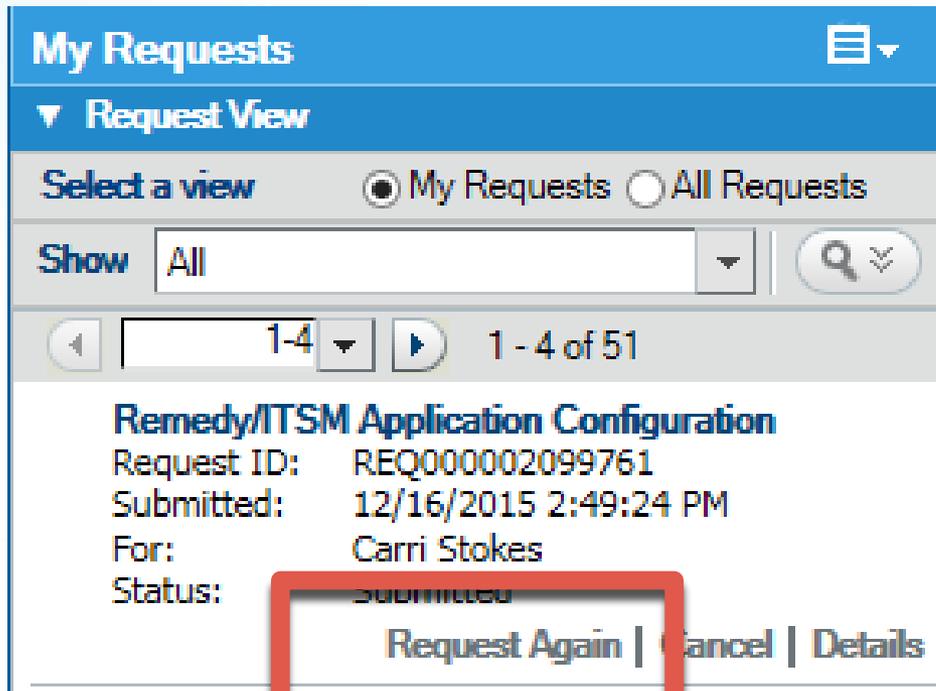
Remedy/ITSM Application Configuration
Request ID: REQ000002099761
Submitted: 12/16/2015 2:49:24 PM
For: Carri Stokes
Status: Submitted

Request Again | Cancel | Details

You can perform various actions on a service request directly from the My Requests section, including Request Again, Cancel and Details.

Lesson 4

View My Requests



My Requests [Menu]

Request View

Select a view My Requests All Requests

Show All [Search]

1-4 1 - 4 of 51

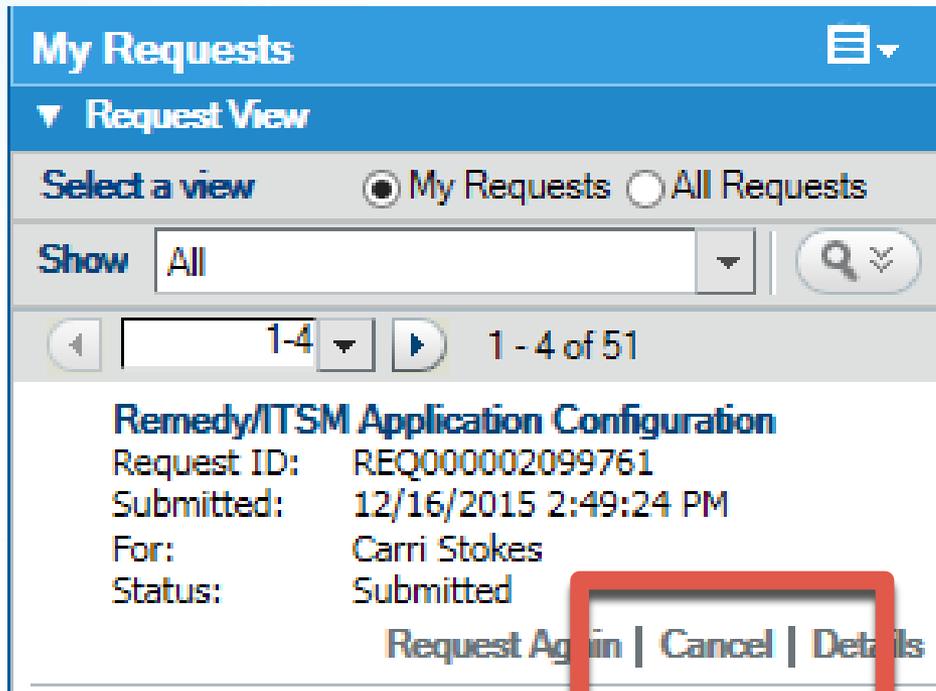
Remedy/ITSM Application Configuration
Request ID: REQ000002099761
Submitted: 12/16/2015 2:49:24 PM
For: Carri Stokes
Status: Submitted

Request Again | Cancel | Details

You might need to create a request that is similar to a previous one that you submitted. With the *Request Again* function you can create a copy of an existing request, the details of which can be modified. You can copy a request regardless of its status. That is, you can copy a draft, a submitted, or a cancelled request.

Lesson 4

View My Requests



My Requests 

▼ **Request View**

Select a view My Requests All Requests

Show 

◀ ▶ 1 - 4 of 51

Remedy/ITSM Application Configuration

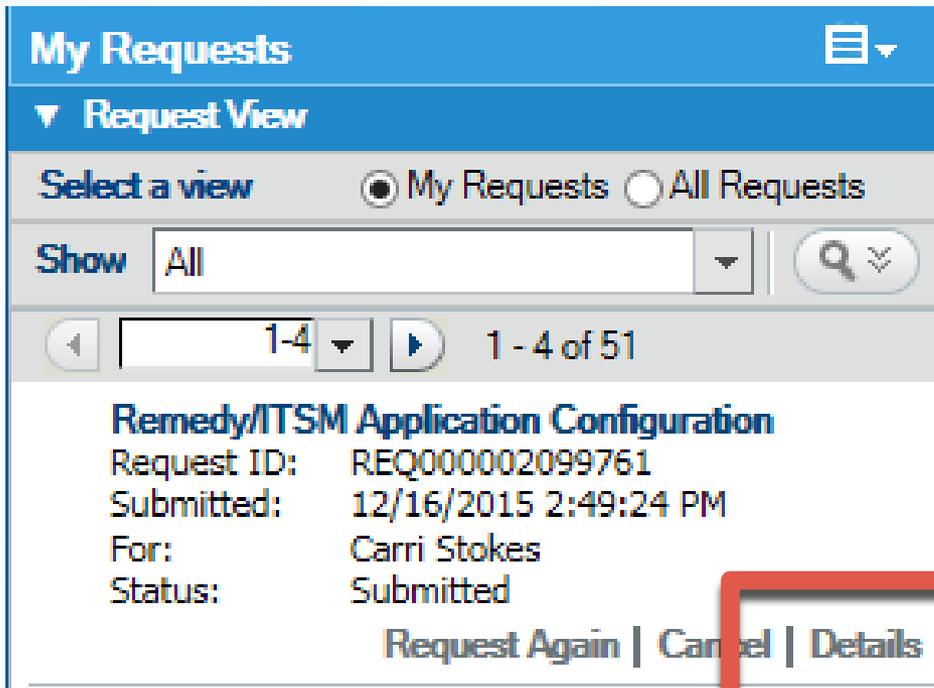
Request ID: REQ000002099761
Submitted: 12/16/2015 2:49:24 PM
For: Carri Stokes
Status: Submitted

[Request Again](#) | [Cancel](#) | [Details](#)

You can cancel a request by clicking **Cancel** located below the request. When you click *Cancel*, a Message Box appears for confirmation. After confirming, the request status changes to **Cancelled**.

Lesson 4

View My Requests



My Requests [Menu Icon]

▼ **Request View**

Select a view My Requests All Requests

Show All [Search Icon]

◀ 1-4 ▶ 1 - 4 of 51

Remedy/ITSM Application Configuration

Request ID: REQ000002099761
Submitted: 12/16/2015 2:49:24 PM
For: Carri Stokes
Status: Submitted

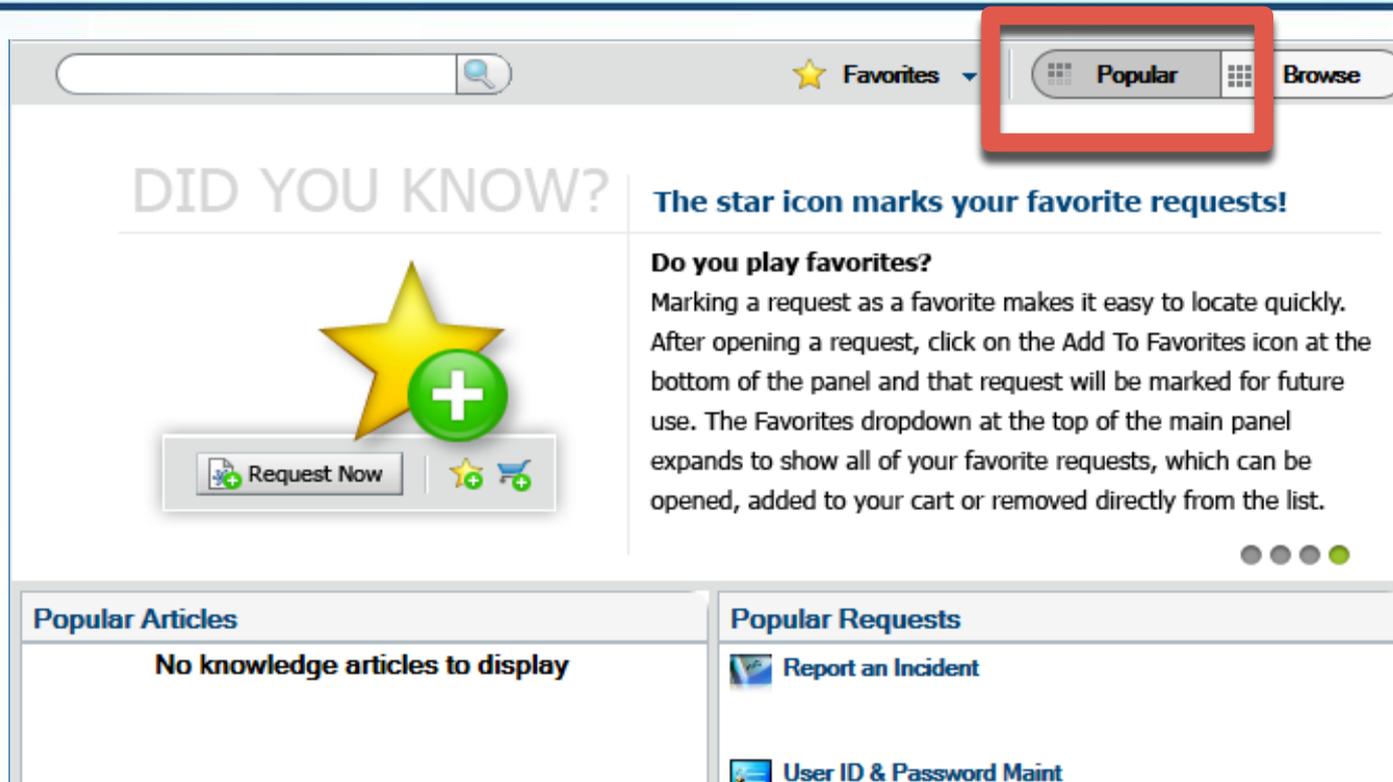
Request Again | Cancel | **Details**

Click the *Details* option if you would like open your service request to see additional information regarding your request.



Lesson 5

Popular Links and Favorites



The screenshot shows a web application interface. At the top, there is a navigation bar with a search icon, a 'Favorites' dropdown menu, and a 'Popular' button highlighted with a red box. Below the navigation bar, there is a 'DID YOU KNOW?' section with a yellow star icon and a green plus sign in a circle. To the right of this section, there is a text box titled 'The star icon marks your favorite requests!' and a sub-section titled 'Do you play favorites?' with explanatory text. Below the 'DID YOU KNOW?' section, there is a 'Request Now' button and a small icon of a star with a plus sign. At the bottom, there are two panels: 'Popular Articles' with the text 'No knowledge articles to display' and 'Popular Requests' with a list of items including 'Report an Incident' and 'User ID & Password Maint'.

In the *Popular* view, you can see a list of popular requests. You can also view a slide show of services and other IT initiatives from CDT.

Lesson 5

Popular Links and Favorites

The screenshot shows a web interface with a navigation bar at the top. On the left, there is a 'Favorites' menu with a star icon and a down arrow, highlighted with a red box. To its right are 'Popular' and 'Browse' buttons. Below the navigation bar is a 'Sub-Categories' dropdown. A red callout box with a white background and a red border points to the 'Favorites' menu, containing the text: 'Once added, the down arrow will show your favorites'. Below this is a blue horizontal bar. Underneath, there is a section titled 'Miscellaneous Non-Billable Request' with a 'Description:' label. The description text reads: 'Use for non-billable requests that do not require management approval. Note: Select this option only when there is not a specific request type elsewhere in the Service Request menu.' At the bottom of this section, there are three buttons: 'Add to Favorites' (highlighted with a red box), 'Request Now', and 'AddTo Cart'. A red arrow points from the 'Add to Favorites' button up towards the 'Favorites' menu.

Once added, the down arrow will show your favorites

Miscellaneous Non-Billable Request

Description:
Use for non-billable requests that do not require management approval. Note: Select this option only when there is not a specific request type elsewhere in the Service Request menu.

Add to Favorites Request Now AddTo Cart

Add service requests as favorites by clicking on the *Add to Favorites button*. Once added, the *Favorites* level displays and the down arrow shows the list of favorites you have added.

Lesson 5

Popular Links and Favorites



You can click on the down-arrow to see your list of favorites. This feature allows you to save the list of service requests that you most frequently request so that you don't have to search them each time to come to the SRM application. As you can see, you can request the service by clicking *Request Now* from the pop-up menu. Also, you can remove a service request by clicking the *Remove* link from the pop-up menu.